

LAW OFFICE OF
JENETTE M. SCHWEMLER, PC
1301 PYOTT ROAD, SUITE 201G
LAKE IN THE HILLS, ILLINOIS 60156
(815) 245-4665

Questionnaire

1. Name: _____
2. Address: _____
3. Phone: _____ (home) _____ (cell)
4. E-mail Address: _____
5. Date of Birth: _____
6. Date of Marriage: _____
7. Are you a U.S. citizen? yes no
8. Spouse's Name: _____
9. Spouse's Address: _____
10. Spouse's Date of Birth: _____
11. Is your spouse a U.S. citizen? yes no
12. What county is your marriage registered in? _____
13. Where were you married? _____
14. Who lives at the residence? _____
15. What is your annual income? _____
16. What is your spouse's annual income? _____
17. Children's Names and Dates of Birth
 - a. _____
 - b. _____
 - c. _____

18. Do any of your children have special needs? yes no
 a. If yes, explain:
19. Do you or your spouse have children by a previous marriage? yes no
20. What kind of parenting time (formerly known as “visitation”) schedule do you want to have?
21. Who should have the “significant decision making responsibility” in the following areas (circle one):
 (a) Education (including choice of school, tutors, etc.): Mother Father Joint
 (b) Medical Care: Mother Father Joint
 (c) Religion: Mother Father Joint
 (d) Extracurricular Activities: Mother Father Joint
22. Have you or your spouse inherited any money or property during the marriage?
 yes no
23. How do you hold title to marital/principle residence?
 joint tenancy tenancy in common single owner in trust
24. Does someone prepare your taxes? _____
 Name Phone
25. Do you consult someone about investment decisions? _____
 Name Phone
26. How did you find out about us?
 a. Attendance at seminar: _____ (location)
 b. Referred by a friend: _____ (name)
 c. Referred by professional contact: _____ (name)
 d. Referred by an agency: _____ (name)
 e. Other: _____

ASSETS

Assets	Husband	Wife	Held Jointly?
Cash Accounts			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Investment Accounts			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Stocks			
	\$	\$	
	\$	\$	
	\$	\$	
Automobiles (equity)			List any loans below
	\$	\$	
	\$	\$	
	\$	\$	
Retirement Accounts (IRAs)			Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
Pension Plans (401(k), etc.)			Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
Life Insurance Policies			Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

Annuities			Designate beneficiary below
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

Bonds			
	\$	\$	
	\$	\$	

Monies Owed to You			
	\$	\$	

Residence (equity)			List mortgages below
	\$	\$	
	\$	\$	

Other Real Estate (equity)			List mortgages below
	\$	\$	
	\$	\$	

Business Interests			
	\$	\$	
	\$	\$	
	\$	\$	

Anticipated Inheritance, Gift			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

Other Assets			
	\$	\$	
	\$	\$	
	\$	\$	

TOTAL:	\$	\$	
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